

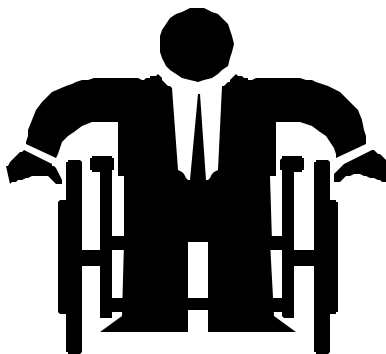
The
Personal Care Assistant
MANAGER



A



RESOURCE
GUIDE



By Deborah Johnston

This Resource Guide was developed with the Independent Living Philosophy as the cornerstone of civil rights for people with disabilities. It is a combination of several highly successful programs that are used by many independent living centers across the country.

Any similarities with other publications was written with the intent of presenting a united mission, from coast to coast, that people with disabilities can, and should live in the most integrated setting as possible, and that a disability is not an excuse to take away the individual's right to live where they choose, whenever possible.

Materials included were used with permission and are duly cited in references. It is my belief that the information contained in this manual should be readily available to all that may benefit from it.



Sponsored by:

**The Arizona Governor's Council on
Spinal and Head Injuries
&
Arizona State University
1999**

PREFACE

The freedom of choice is the fundamental basis for living an independent life. However, with this freedom comes responsibility. This Resource Guide gives individuals with disabilities who have made the choice to be in control of their lives the knowledge that is necessary to manage their independence successfully. It helps in answering questions about issues that need to be discussed and managed, and also indirectly helps the people whom they encounter.

The transition from victim to manager/employer is never a smooth one but with the help of this Resource Guide it can be a clearer journey. Often newly disabled persons feel like they are not in control of their lives and often, the people who make up their support system can perpetuate this feeling unintentionally. This can be devastating to a person's sense of worth and self-esteem. The best way to rebuild self worth is to give back the decision-making responsibility. As independence increases self-esteem will also improve.

As an employer of a personal assistant, the individual with a disability will be running a small business using the skills of a personnel manager. It is now his/her own responsibility to maximize independence. This manual will help him/her succeed as an employer.

Deborah Johnston
Arizona State University
Tempe, AZ
1999

INTRODUCTION

The PCA Manager's Resource Manual is intended to be a tool to assist individuals with disabilities in organizing, hiring, and managing everyday life using the services of a Personal Care Assistant. It contains methods to use in maintaining a professional, ongoing relationship with their PCAs. It should be helpful to those who are hiring their first PCA as well as individuals who have been hiring PCAs for many years. It allows the user to utilize his/her talents to the best potential by removing the guesswork in employee management. Most importantly, it allows them to break out of the victim condition and traverse the gap to become the empowered ruler of their domains.

The manual is organized in an easy to follow manner that will take you through the procedures of organizing your life with personal assistants. It will take you through the evaluation process, interviewing, hiring, managing, compensating, and communicating with your PCAs. It presents techniques and procedures that when used properly will seem time consuming, but will save time and trouble later on.

As you go through the process keep in mind that each situation is unique and the techniques that are offered should be modified somewhat to fit the individual need. Developing good habits from the beginning makes the ongoing relationship easier to manage. Good organization is the key to eliminating uncertainty and doubt. Good employer organization and clear PCA's responsibilities create a more efficient PCA. You will both be happier with the employment situation.

Personal assistance means that users (the disabled employer) exercise the maximum control over meeting his/her needs the way he/she wants. The individual user must be able to recruit, train, schedule, supervise, and, if necessary, fire his/her own assistants.

Personal assistance means the user is the boss.

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THE ROLE OF THE PCA

The role of a Personal Care Assistant is difficult to define specifically because of the diversity of disabilities that exist. Each PCA may be hired to do different tasks according to the needs of the hiring individual. A general description is best explained by describing the purpose for hiring a personal assistant.

Persons with extensive disabilities need assistance by other people in their everyday lives with such activities as getting bathed and dressed or using toilet facilities; shopping, preparing meals, cleaning, or doing the laundry; doing practical tasks involved in raising small children or assisting one's aging parents. Assistants help the user at work, around town, or on travel trips. They may also assist in communicating to others. In short, **assistants help with those activities, which the user would have done by himself/herself, if it had not been for a physical, sensory, or mental disability.**

Just as other persons with less extensive limitations compensate their disabilities with assistive devices like braces, crutches, or other prosthetics, personal assistance can enable more limited individuals to become fully-functioning members of the community.

People who are dependent on others for basic needs encounter prejudices. People have a tendency to equate physical dependence with emotional and intellectual dependence. For example, a person who can not pull up his/her pants like a small child may be treated as a small child in other respects. The result is overprotection and custodial care where other people make the decisions, and quality of life suffers.

Those who are dependent on daily assistance easily understand the Independent Living Philosophy. This is also why the independent living movement emphasizes the importance of quality assistance for those who want to maximize independence.

What a PCA is **NOT**:

- PCAs should not be viewed as parents, servants, medical personnel, or personal friends, although the relationship between an employer and PCA may contain elements of these. For example, a PCA may prepare meals as a parent would, but it is the responsibility of the person with the disability to instruct the PCA on the preparation of his or her meals. This responsibility does not exist in a parental relationship.

It is important to realize that a PCA is not a servant that is to wait on you hand and foot.

- PCAs work for the person with the disability, not the person's family or friends. Showing respect for a PCA is a major consideration in maintaining a good working relationship with him or her.
- A PCA is not a companion/baby-sitter to a person with a disability. This belief stems from a desire to overprotect the person rather than to provide the necessary assistance for him or her to function independently.

Although it often happens that employers and their PCAs become friends, they should not let the friendship aspects of the relationship interfere with or infringe upon the business aspects of the relationship. If the friendship grows to the point of dominating the relationship, the employer might seriously consider ending the working relationship and keeping the friendship. Otherwise, communicating needs for PCA services may be severely impaired. For example, it may be difficult to tell a close friend that he/she should come earlier in the mornings. It could unfairly strain a friendship to continue as a PCA.



EVALUATING YOUR NEEDS



- **Before You Interview**
- **How Do I Start?**
 - **Needs Checklist**
 - **Personal Needs / Task List**
- **Hourly vs. Live-in**

BEFORE YOU INTERVIEW

Preparation is the key to making a good choice when hiring a new PCA.

Purpose:

To make the process of choosing an assistant who will be best suited for the job and provide a structure to enhance communications between the disabled person and assistant.

Strategy:

Work expectations must be very clear to the applicant, should he/she work for you. It is also very important that you determine the applicants' comfort level with the tasks you will expect him/her to perform. For example, if an applicant is not comfortable with your bathing needs he/she is probably the wrong person to hire for that task.

It is up to you whether you use the checklist system. You may prefer to devise your own checklist. The essential human chemistry: your tone, attitude, respect, the way you interact, how you 'gel', etc., remain aspects only the two of you can deal with. If you don't 'click' with each other, then a structure may enable you to survive, but it won't resolve basic 'chemistry'.

It may be necessary to hire several PCAs for different times of the day and for "on call" basis (as back up). Setting up an interview format can make the process easier for you both.

You may find my suggestions too formal and contrary to your understanding of an assistant/user relationship. The intention is to provide a structure, a basis to break the ice, answer questions, eliminate doubt, and protect your interests.

HOW DO I START?

To begin, it must be clear to you exactly what you need a PCA for. It isn't enough to simply say, "I need help." Your first task is to do a needs assessment to determine exactly what the PCA will do for you. A list of daily tasks will help with this. Next you must determine approximately how long it will take the PCA to perform those tasks each day. A NEEDS CHECKLIST can help you get started. An example of this is included in this chapter.

Go through your daily routine with someone and record the time it takes to do each item. Be careful to estimate the time you require as accurately as possible. (You may want to do it a few times and take the average time for your list to allow for the unexpected). This will give you an idea of how much time you will require from your PCA, and how much it will cost you in wages.

It is important that you establish a clear routine so you can provide the PCA with adequate direction and supervision. A copy of this list should be given to the PCA you **INTERVIEW** so that his/her duties are clear from the start.

DUTIES DESCRIBED ON THE LIST MAY VARY FROM TIME TO TIME, DEPENDING ON NEED, BUT THIS VARIANCE IS SLIGHT AND SHOULD NOT EFFECT DAILY REQUIRED HOURS

NEEDS CHECKLIST

<u>AREA</u>	<u>HOW OFTEN / WHEN</u>	<u>TIME ON TASK</u>
1. DAILY ACTIVITIES		
<input type="checkbox"/> GETTING UP	_____	_____
<input type="checkbox"/> GOING TO BED	_____	_____
<input type="checkbox"/> DRESSING	_____	_____
<input type="checkbox"/> UNDRESSING	_____	_____
<input type="checkbox"/> EATING	_____	_____
<input type="checkbox"/> OTHER (E.G. BRACES, PROSTHESIS, CORSET, ETC.)		
<input type="checkbox"/> EXPLAIN: _____		

2. GROOMING HYGENE

<input type="checkbox"/> SHOWER	_____	_____
<input type="checkbox"/> BATH (TUB, BED, SPONGE)	_____	_____
<input type="checkbox"/> SHAVING	_____	_____
<input type="checkbox"/> BRUSHING TEETH	_____	_____
<input type="checkbox"/> HAIR CARE	_____	_____
<input type="checkbox"/> COSMETICS	_____	_____
<input type="checkbox"/> OTHER :	_____	
<input type="checkbox"/> DESCRIBE :	_____	

3. MOBILITY / TRANSFERS

<input type="checkbox"/> TRANSFERS-BED	_____	_____
<input type="checkbox"/> TRANSFERS-VEHICLE	_____	_____

Form: (006) Rev. 2/98

<u>TASK</u>	<u>HOW OFTEN / WHEN</u>	<u>TIME ON</u>
-------------	-------------------------	----------------

- | | | |
|--|-------|-------|
| <input type="checkbox"/> HOYER LIFT | _____ | _____ |
| <input type="checkbox"/> PUSHING CHAIR | _____ | _____ |
| <input type="checkbox"/> DRIVING | _____ | _____ |
| <input type="checkbox"/> TURNING | _____ | _____ |
| <input type="checkbox"/> OTHER : | _____ | |

4. TOILETING

- | | | |
|--|-------|-------|
| <input type="checkbox"/> EMPTY LEG BAG | _____ | _____ |
| <input type="checkbox"/> CATHETER / BLADDER CARE | _____ | _____ |
| <input type="checkbox"/> OSTOMY APPLIANCE CARE | _____ | _____ |
| <input type="checkbox"/> TRANSFER-COMMODE | _____ | _____ |
| <input type="checkbox"/> CHANGE CATHETER | _____ | _____ |
| <input type="checkbox"/> CHECK URINARY PH | _____ | _____ |
| <input type="checkbox"/> BOWEL ROUTINE | _____ | _____ |
| <input type="checkbox"/> OTHER : | _____ | |

5. MEDICAL

- | | | |
|--|-------|-------|
| <input type="checkbox"/> ADMINISTER MEDICATION | _____ | _____ |
|--|-------|-------|

Name / Dosage

- 1) _____
- 2) _____
- 3) _____

- | | | |
|------------------------------------|-------|-------|
| <input type="checkbox"/> FIRST AID | _____ | _____ |
|------------------------------------|-------|-------|

Form (006) Rev. (2/98) _____

TASK**HOW OFTEN / WHEN****TIME ON**

- | | | | |
|--------------------------|---------------------------|-------|-------|
| <input type="checkbox"/> | IDENTIFY & TREAT DECUBITI | _____ | _____ |
| <input type="checkbox"/> | READ THERMOMETER | _____ | _____ |
| <input type="checkbox"/> | RANGE OF MOTION | _____ | _____ |
| <input type="checkbox"/> | RESPONSE TO EMERGENCIES | _____ | _____ |
| <input type="checkbox"/> | OTHER : | _____ | |
-

1. HOUSEKEEPING

- | | | | |
|--------------------------|----------|-------|-------|
| <input type="checkbox"/> | CLEANING | _____ | _____ |
| <input type="checkbox"/> | LAUNDRY | _____ | _____ |
| <input type="checkbox"/> | COOKING | _____ | _____ |
| <input type="checkbox"/> | SHOPPING | _____ | _____ |
| <input type="checkbox"/> | OTHER : | _____ | |
-

7. MISCELLANEOUS

- | | | | |
|--------------------------|-------------------------------|-------|-------|
| <input type="checkbox"/> | READING | _____ | _____ |
| <input type="checkbox"/> | WRITING | _____ | _____ |
| <input type="checkbox"/> | BOOKKEEPING | _____ | _____ |
| <input type="checkbox"/> | RECREATION | _____ | _____ |
| <input type="checkbox"/> | ANSWER TELEPHONE | _____ | _____ |
| <input type="checkbox"/> | ERRANDS (bank, cleaners, etc) | _____ | _____ |
| <input type="checkbox"/> | WHEELCHAIR MAINTENANCE | _____ | _____ |
| <input type="checkbox"/> | OTHER : | _____ | |
-

PREPARING A NEEDS/ TASK LIST

Now that you know what needs to be done you can customize the list to include the extra or specific things you want a PCA to do. Explaining the job tasks in this way helps to clarify your expectations of the PCA. This will be your NEEDS LIST, or TASK LIST.

To create a successful personal needs list you must follow a few guidelines:

1. **Be brief** - Try to make the steps as short as possible.
2. **Put steps in correct order** – Make sure steps are arranged in the order they are to be performed. This clarifies the routine and avoids skipping work you need to have done.
3. **Include what, when, where** – Your PCA needs to know what materials are needed and when and where the job will be performed. He/she is probably not a clairvoyant (mind reader).
4. **Avoid how** – This doesn't belong on your checklist. You should teach it while the task is being performed. However, be sure to specify those steps that are essential (or often neglected).

The NEEDS LIST may also be called a TASK LIST since you need to have certain things done which becomes the tasks. The list depends on you and how much the PCA is expected to do and on how familiar he/she is with doing the tasks you require. For example, if an applicant has done catheter changes in the past you may simply state that it needs to be done. However, if he/she is not familiar with catheter changes a step-by-step description may be in order. Since you do not know the qualifications of your applicants you can save a lot of time and frustration by being as clear as possible in your needs.

Samples of a simple and detailed NEEDS LIST are included in this section. You will need to compose your own according to your personal preferences. Everyone's method for accomplishing various tasks is different. **You** must decide how you want things done.

A benefit of preparing these lists is to prepare the PCA for the new job and to make the routine go smoother. It will also help both of you to know what to expect on paydays.

The Needs List should be used during the interview process. It may be referred to separately as a job description, as well as being part of the employment contract. **You may have several task lists, one for each PCA and they may be divided into morning, afternoon, and evening.**

Once the preliminary steps finish and you have decided to hire an applicant, a copy of this list should be given to the PCA you **HIRE** for reference to keep his/her duties clear. Amendments to the list should be in writing. Additional tasks must be agreed upon by you and your PCA and added to the list. To avoid later conflict all amendments should be initialed by both of you. Any deviation to this list is highly discouraged on a regular basis.

WHETHER IT IS INCORPORATED IN THE CONTRACT DOCUMENT OR NOT, THIS LIST IS CONSIDERED PART OF THE EMPLOYMENT CONTRACT BETWEEN YOU AND YOUR EMPLOYEE AND SHOULD BE REGARDED SERIOUSLY.

The most important aspect to remember is even though the tasks have been written for the PCA, **IT IS YOUR RESPONSIBILITY TO ENSURE THE TASKS GET DONE.**

SIMPLE NEEDS / TASK LIST

The following is an example of a simple list for a typical morning routine:

MORNING ROUTINE - Total time = 2 hours

1. Prepare clothes for the day.
2. Obtain catheter. Remove condom and night bag, and insert catheter.
When done, remove catheter, placing it in sterilization bottle.
3. Wash, rinse, and dry body.
4. Put new condom on, and hook up new bag.
5. Assist with stretching.
6. Put on deodorant and cologne.
7. Assist with dressing
8. Unplug wheelchair and transfer to chair.
9. Brush teeth and hair.
10. Make breakfast.
11. General clean-up: make bed, neaten bathroom, **drain and rinse night bag.**

Experienced PCA users have suggested that to prevent any future misunderstandings a more detailed list is appropriate. It can be incorporated into the employment contract as a job description rather than a separate document. The detailed contract presented in this manual refers to the following list as addendum “A” job description.

An example of this would be as follows:

- ____ 1. Catheterization or Bladder Irrigation .
- ____ 2. Changing of External or Indwelling Catheter.
- ____ 3. Changing of Ileostomy, Ileal Conduit or Colostomy Appliance.
- ____ 4. Bowel Care, Digital, Enema, or Colostomy.
- ____ 5. Urinary Drainage; Emptying and Cleaning drainage bags.
- ____ 6. Changing Wound Dressing.
- ____ 7. Bathing.
- ____ 8. Dressing, including Prosthetic and/or Orthotic appliances such as artificial limbs, braces, or garments.
- ____ 9. Transfer, including use of sliding board or lifting device.
- ____ 10. Grooming, including shampooing, brushing hair, and applying make-up.
- ____ 11. Brushing teeth.
- ____ 12. Shaving.
- ____ 13. Hand and foot care, including nails.
- ____ 14. Skin care, including preventative measures for pressure sores and treating hemorrhoids.
- ____ 15. Meal preparation.
- ____ 16. Feeding, including the use of assistive devices.
- ____ 17. Laundry and Ironing.
- ____ 18. Household and Equipment Cleaning.
- ____ 19. Driving, including the use of transfer board, mechanical lifts, and safety restraints.
- ____ 20. Household management, including shopping, writing checks and checking account reconciliation.
- ____ 21. Physical Therapy, including range of motion exercises.
- ____ 22. Respiratory Therapy, including tracheotomy suctioning.
- ____ 23. Use of electronic devices, including minor maintenance.
- ____ 24. Management of wheelchair, including minor maintenance.
- ____ 25. Set-up of ADL devices.

In a later chapter which contains employment contracts this list is referred to as “Addendum A” on the detailed contract sample.

HOURLY VERSUS LIVE-IN PCA

Determining whether you would prefer an hourly or live-in PCA can be difficult. Each has its advantages and disadvantages.

Purpose:

Decide which type of assistance is best for your lifestyle and which you prefer.

Strategy:

A good place to start would be to make a list of the advantages and disadvantages of each type of assistance. Use your job task list to help you determine what needs to be done during each day, and the time it requires to get them done.

Hourly PCA

Advantages:

- Maintains your privacy
- May be more economical for lifestyle
- Simplifies termination when necessary

Disadvantages:

- More likely to be late for their scheduled shift
- Higher turnover rate for position
- Availability during the day
- May need to hire more PCAs than with live-in

Live-in PCA:

Advantages:

- More likely not to be late for their scheduled shift
- May be more economical for your situation
- May require more time from your PCA
- Lower turnover rate
- PCA has a personal interest in maintaining household

- Fewer PCAs may be needed due to availability of live-in

Disadvantages:

- May come to depend on PCA to a greater extent than you should
- Lack of privacy in your home
- Household security could be compromised by PCA and/or their guests

Depending on your personal preferences and lifestyle, you may have more items of concern or you may determine that some of the ones listed are not a concern for you at all. None-the-less, it is a general list of things that should be considered.

There are some other questions that must be answered before you can begin the interview process.

1. Are you looking for full or part-time help?
2. What times of the day do you need the most help? (Morning; evening; throughout the day?)
3. Do you want a PCA with his/her own transportation or to live near a bus stop? Or to live with you?
4. What are your transportation needs? Is your PCA going to be required to drive you places?
5. Do you want a male, female, or does it matter to you?
6. Is age, race, or religion a preference?
7. Is the PCA only needed for personal tasks or do you need homemaking services too?
8. What are your financial resources like?

Once the needs assessment is completed you can begin the hiring process.

THE INTERVIEW PROCESS

- Advertising
- Prior to Hiring
- The Telephone Interview
- Checking References
- Personal interview
- Evaluating the Applicant
- Making An Offer

ADVERTISING

Posting descriptive want ads Eliminates unwanted calls.

Purpose:

To find PCAs appropriate for you.

Strategy:

Describe the job in as much detail as possible to convey what is involved without giving specifics. Do not try to hide the facts but leave specifics for the interview.

Locations to advertise:

- College campuses. Community colleges and universities offer inexpensive advertising and access to a large population of educated potential PCA's
- Local neighborhood newsletters
- School newspaper classifieds
- Disability resource center
- College employment offices
- Church bulletins
- Employment agencies
- YMCA/YWCA
- Bulletin boards at: Colleges, Grocery stores, Libraries, Hospitals, HMO's
- Nursing and pre-health departments

Avoid advertising in large newspaper classifieds. They are expensive and the applicants may be more diverse than what you are looking for.

A want ad/poster may be used on campuses and public bulletin boards. A little creativity is necessary to catch the interest of potential applicants. The following pages are examples of posters and ads to use.



HIRING PERSONAL ASSISTANTS

FOR A

FEMALE QUADRAPLEGIC

**DUTIES INCLUDE ASSISTING WITH
BATHING, LIFTING, AND LIGHT
HOUSEWORK**

~~~~~

PART-TIME HOURS FLEXIBLE FOR STUDENTS

**PAY FROM \$6.50/HR DOE**

FOR MORE INFORMATION CALL – SUE 555-1111

**TYPES OF SUCCESSFUL CLASSIFIED ADS ARE:**

**WANTED  
ATTENDANTS**

**Students to work part-time as a  
Personal Care Attendants to assist a  
person with disabilities in their daily  
routine. Hours are flexible – pay varies.  
No Experience Necessary. Stop by DRS  
at Matthews Center or Call  
Sue Brown  
555-1111**

**WANTED – dependable person to provide  
PERSONAL CARE ASSISTANCE for a disabled  
Quadriplegic adult with daily routine. 6-9 M-F.  
Salary: \$6.50-\$8.00/hr DOE. Call Rick at  
555-1111 evenings.**

**HIRING PERSONAL CARE ATTENDANT**

**Assist in the daily routine of a person with  
disabilities. Tasks incl. bathing, getting in or  
out of bed, lifting, laundry, and shopping.  
Hours flexible, pays \$7.50/hr. Part-time.  
Call – Sandy at 555-1111 ext. 0601**

**ATTENTION NURSING STUDENTS !!**

**Personal Attendants needed for people with  
disabilities. No exper. necessary-Will Train.  
For Info Call Tom – 555-1111 ext. 9990**



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# PRIOR TO HIRING

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## Are you are ready to hire a new PCA?

This final checklist will help you through the final process.

### **Purpose:**

To ensure you have followed the steps appropriately. Each step is very important for finding a PCA with whom you can have a successful working relationship.

### **Strategy:**

- \_\_\_ 1. Have completed a telephone interview.
- \_\_\_ 2. Have reviewed the job tasks with the applicant.
- \_\_\_ 3. Have evaluated the applicant after the telephone interview.
- \_\_\_ 4. If positive evaluation, have completed a personal interview.
- \_\_\_ 5. Have received completed application.
- \_\_\_ 6. Have checked references.
- \_\_\_ 7. Have fully evaluated the applicant again after the personal interview.

The telephone interview is a critical preliminary step to allow the applicant to indicate to you misgivings about the details you discussed and allows them to back out of a questionable situation before you have invested a lot of time and energy. It also allows you to screen for safety issues. A lot can be learned about a person from a telephone conversation. Don't put yourself at risk unnecessarily, if it does not sound like a good match it probably isn't.

Once you have completed these steps, you are ready to decide if you should hire the applicant. If you choose not to hire the applicant, call the applicant as soon as possible. If you choose to hire the applicant, you can continue on with the hiring process to include signing a contract, deciding on compensation, and training details.

---

# PCA APPLICATION

---

NAME: \_\_\_\_\_ SS# \_\_\_\_\_

ADDRESS: \_\_\_\_\_

CITY: \_\_\_\_\_ STATE: \_\_\_\_\_ ZIP CODE: \_\_\_\_\_

PHONE: \_\_\_\_\_ - \_\_\_\_\_ MESSAGE # \_\_\_\_\_ - \_\_\_\_\_

Do you have a valid Arizona Driver's License? YES \_\_\_\_\_ NO \_\_\_\_\_

Source of transportation: car \_\_\_\_\_ bus \_\_\_\_\_ bike \_\_\_\_\_ walk \_\_\_\_\_

Have you had any prior convictions? YES \_\_\_\_\_ NO \_\_\_\_\_

Do you agree to a background search? YES \_\_\_\_\_ NO \_\_\_\_\_

Do you smoke? YES \_\_\_\_\_ NO \_\_\_\_\_

Do you have any physical and/or medical problems that would interfere with performing the duties of this position? (e.g. back/knee problems) YES \_\_\_\_\_ NO \_\_\_\_\_

If yes, explain: \_\_\_\_\_

Please give three references, 2 from former employers, and 1 personal:

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Occupation: \_\_\_\_\_

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Occupation: \_\_\_\_\_

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Occupation: \_\_\_\_\_

Do you give your permission for me to contact your previous employers?

YES \_\_\_\_\_ NO \_\_\_\_\_

Please indicate the hours you are available to work, include AM or PM:

| Monday | Tuesday | Wed. | Thursday | Friday | Saturday | Sunday |
|--------|---------|------|----------|--------|----------|--------|
|        |         |      |          |        |          |        |

By signing below, you agree that the above information is true and correct.

|           |       |          |       |
|-----------|-------|----------|-------|
| _____     | _____ | _____    | _____ |
| Applicant | Date  | Employer | Date  |

---

# TELEPHONE INTERVIEW

---

## INTERVIEWING IS TIME CONSUMING!

Start screening potential PCAs with a telephone interview.

### Purpose:

To exchange basic, yet important information about the job and to determine the applicant's interest level so that you can decide whether it would be advantageous to do a personal interview.

### Strategy:

Prepare questions prior to speaking with an applicant on the phone. This will save time, and you will be sure to cover important items.



The following is a sample of some questions to ask, and information you may wish to cover. You may wish to add other questions that pertain to your personal situation, or eliminate others that don't apply to you. The telephone interview can be as extensive or brief as you feel is necessary.

- What experience/training do you have, if any?
- I need someone from 7 p.m. to 9 p.m. on MWF. Are you available during these hours?
- Would there be anything that would interfere with you being **on time** for the hours you would be required to work?
- Some of the tasks I would ask you to do will be ... (list major jobs) Would you feel comfortable with doing them?
- What is your expected compensation? Do you have a pay range in mind?
  - I weigh 160 lbs. Are you willing and able to transfer me to and from my wheelchair?

- Do you have any physical limitations that would not allow you to transfer me, such as occasional back problems?
- Do you drive or have a current driver's license?
- Do you smoke?
- When are you able to start work?

DO NOT BE AFRAID TO ASK SOMETHING OF THE APPLICANT THAT IS IMPORTANT TO YOU, IT IS YOUR TIME TOO! ALSO ASK IF THE APPLICANT HAS QUESTIONS FOR YOU!

**It is advisable not to ask for a personal interview right away. You want to take time to think about the applicant's questions and answers. Inform the person that you are evaluating all applicants and that you will be calling him/her back, or schedule a personal interview in a day or so.**



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# PERSONAL INTERVIEWS

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The second interview is much like the first one that you had over the phone. It is a chance to evaluate the applicant non-verbally, and also an opportunity for them to evaluate you. Check body language and ask yourself if you both seem comfortable together. Do not hire the person right away. Take time to evaluate them again after this interview.

## **Purpose:**

To learn more about each other. It is the time to observe visual cues and personal impressions. ( If the chemistry is not there then hiring him/her would not be advisable ).

## **Strategy:**

Pre-plan each interview by looking at the job description and the necessary skills. Select the most important skills for evaluation. Develop open-ended questions that focus on their previous jobs or life experiences. If they have no prior experience as a PCA, again, look for consistency and contradictions in answers.

### **A comfortable interview may go as follows:**

- Establish rapport to make applicants feel comfortable. Small talk will do until you are both seated comfortably for the task at hand. Personality is very important. Know in advance the personality traits you are looking for. Ask yourself if this person fits the bill. This is not the time to rush through, get ALL your questions answered.
- Ask open-ended questions. (From your list)
- Find out why they applied for YOUR job. What are his/her expectations. How is working for you going to help him/her meet his/her goals?

### **Examples include:**

1. Past job experiences. (Get specifics) Remember silence is OK. Give them time to answer.(You are verifying what they said before to look for inconsistencies)
  - In your last job, were you always on time? If not, what caused you to be late, and how did you handle the situation? Reliability is very important.

- Did you have any problems with your former employers? If so, how did you handle the problem?
  - Describe an emergency situation and ask how he/she would handle it.
2. Discuss transportation in detail, including back-up plans in case the inevitable occurs like car trouble. Try to hire someone close to home (within 5-7 miles)
  3. Find contrary evidence. If you are seeing all positives, look for negatives, and vice versa. No one is perfect. Get a balanced picture of the person.
  4. Have the applicant read the job description and job task list to determine if he/she is comfortable with everything the job demands.
  5. Describe to applicant the role of your PCA. Have the person read “What your PCA **IS**, What your PCA is **NOT**” at the beginning of this manual.
  6. Discuss pay rate, hours, time off, possible stand-by need (can you call on him/her in an emergency)



Make sure the applicant understands what the PCA role would be in your life. Have the person define it in his or her own words to make sure the person has a clear understanding of the position and what you expect.

This is not a long list. You may want to include more. If it seems like this process is a little repetitive you are correct. You are giving the PCAs you hire full access to your home and your life so you had better be sure that the applicant is truthful. Give them plenty of opportunity to show their true self **BEFORE** you hire them, not after.

Make sure you have a completed application, and tell them you are evaluating all your applicants and will notify him/her about the position within a certain time frame.

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# CHECKING REFERENCES

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Checking references will allow you to again look for inconsistencies in the answers the applicant has given you.

**Purpose:**

To learn if there are significant reasons not to hire the applicant.

**Strategy:**

Call all references given to you with pre-planned questions. Consider a background search to find if there have been any legal problems in the applicant's past, especially if you are intending for the person to live with you.

**Some questions to ask references:**

- Explain the reason you are considering applicant, and ask whether he/she feels the applicant would be appropriate for the position.
- Would they re-hire the applicant if given the chance?
- Ask the reason the applicant left/was fired.
- Were there particular problems with the applicant, such as being continually late?
- Verify experience indicated on application. This helps identify truthfulness and how well the applicant can understand, interpret, and communicate verbally.

You may find that, in some circumstances, a background check is also in order. If something the applicant said does not sound right, or if something one of their references say does not match with what the applicant said you may want to pursue a check of his/her background. You will need to rely on your own feelings about this.



**Things to be cautious of:**

1. Past job experiences. (Get specifics) Remember silence is OK. Give them time to answer.
  - In your last job, were you always on time? If not, what caused you to be late, and how did you handle the situation?
  - Did you have any problems with your former employers? If so, how did you handle the problem?
  - Describe an emergency situation and how you have or would handle it.
2. Find contrary evidence. If you are seeing all positive, look for negative, and vice versa. No one is perfect. Get a balanced picture of the person.
3. Have the applicant read the job description and job task list to determine if he/she is comfortable with everything the job demands.
4. Describe to applicant the role of your PCA. Have the person read “What your PCA **IS**, What your PCA is **NOT**” at the beginning of this manual.

Make sure the applicant understands what the PCA role would be in your life.

Have the person define it in his or her own words to make sure the person has a clear understanding of the position and what you expect.

This is not a long list. You many want to include more. Have the applicant fill out the application, and tell them you are evaluating all your applicants and will notify him/her about the position within a certain time frame.

Arizona Companies that will do background searches:

Hire Standards  
602-581-3811

Decision Support Resources, Inc.  
602-483-1400

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# EVALUATING THE APPLICANT

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Take time to evaluate each applicant after each interview before you determine whether you want to hire him or her.

**Do not hire the applicant on the spot.**

## **Purpose:**

To determine whether you were satisfied with the way the applicant answered your questions and to look for inconsistencies and/or contradictions in those answers.

## **Strategy:**

Jot down a list of what qualities you feel are most important in a PCA. After the interview, determine whether the applicant met those qualifications.

### **Some things to consider:**

1. If the applicant remained consistent in the answers to my questions
2. Did I get along with the applicant's personality
3. In the personal interview, was the applicant on time
4. Did the applicant understand the nature of the job
5. In the personal interview, was the applicant neatly dressed and clean

This is a very brief list and you may want to include more items that are important to you.

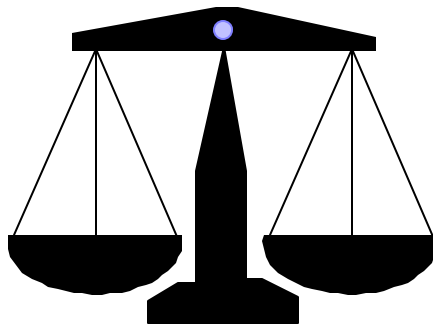
### **After evaluating the applicant, you have two options:**

1. You may feel that you need to spend more time getting to know him/her.
2. You do not feel this person is right for you.

If you feel uncomfortable with the way the person has answered the questions during the telephone interview, it would be beneficial for both of you not to make an appointment for a personal interview. Save your time and his/hers. You should thank the applicant for his/her interest and time, but be honest and let the person know that he/she does not meet the requirements.

If you have a positive evaluation of the applicant, make an appointment to meet in person. When meeting a person for the first time, it is recommended you do so in a public place, such as a restaurant, to insure your safety.

**BE SURE TO LOOK AHEAD IN THE COMMUNICATION SECTION REGARDING PERSONALITY TYPES BEFORE YOU DECIDE ON A SPECIFIC PCA.**



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# MAKING AN OFFER

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**COME TO THE MEETING PREPARED WITH ALL THE NECESSARY PAPERWORK YOU WILL NEED TO GIVE THEM:**

1. A job task list
2. An offer letter
3. An employment agreement/contract for the applicant to sign for your records
4. The attendant's expected work schedule / "Addendum B" from the detailed contract
5. A time sheet
6. If necessary, a W-4 form for tax purposes (May obtain from IRS)
7. A key to your home (if needed for live-in or early morning attendant)

**REMEMBER, JUST BECAUSE YOU MAKE AN OFFER THAT DOESN'T MEAN THE APPLICANT WILL TAKE THE JOB. S/HE PROBABLY WILL, BUT THERE IS A CHANCE THAT S/HE HAS NOT MADE A DEFINITE DECISION.**

There are some cases where it is urgent that s/he starts working immediately. In such cases this paperwork will have to wait. However, it is imperative that you take care of these things within a week or so. The sooner you do it the better the chance is that you won't forget to take care of everything.

Keep a personnel file on each PCA. Their time records, paperwork, tax forms, and notes you make can be kept together. In the future you may be asked to give a work reference for him/her and you will have all the documentation you need without having to rely on your memory for it. It also helps to document conflicts and problems as you go. This will help eliminate the "he said she said" scenario.

You may prefer to keep these records on computer. Be sure to password protect the files and keep a back-up copy on disk. This is your private, business information and will help to insure that no one alters the information without your knowledge. It is advisable that all entries and updates be made without the PCA present.

**YOU ARE AN EMPLOYER AND EMPLOYEE INFORMATION SHOULD BE KEPT CONFIDENTIAL.**

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# SAMPLE OFFER LETTER

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Your Name

Today's Date

Address

City, State Zip

Applicant's Address

City, State Zip

Dear \_\_\_\_\_,

I would like to take this opportunity to offer you the position as my Personal Care Assistant for the hours listed below, starting on \_\_\_\_\_(Date)\_\_\_\_\_.

| Monday  | Tuesday | Wednesday | Thursday | Friday  | Saturday | Sunday  |
|---------|---------|-----------|----------|---------|----------|---------|
| 8-10 AM | --      | 8-10 AM   | --       | 8-10 AM | 8-10 AM  | 8-10 AM |
| 9-11 PM | 9-11 PM | 9-11 PM   | 9-11 PM  | 9-11 PM | --       | --      |

Per our conversation, if you find that you can not be there for your regularly scheduled hours please call me at the earliest opportunity so that I may make other arrangements for assistance.

The rate of pay I offer is \$ \_\_\_\_\_ per hour and is paid through a subsidy that I receive, or by myself.

I am looking forward to working with you.

Regards,

Your Name

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# BASIC EMPLOYMENT AGREEMENT

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I, \_\_\_\_\_ accept the employment offer made to me by \_\_\_\_\_ on \_\_\_\_/\_\_\_\_/\_\_\_\_, as a Personal Care Assistant.

I understand that my responsibilities include tasks that are very critical to my employer and that they be done according to the schedule agreed upon. I will not deviate from this schedule if at all possible unless we both agree on a change in routine. Neither party may change this without consulting the other and must be in agreement by initialing my PCA time sheet. **Should unforeseen circumstances arise, I will notify my employer as soon as possible so he/she can make arrangements to have his/her needs met.**

In return for the amount of \$\_\_\_\_\_/HR, employee agrees to comply with all laws and regulations applicable to the employment of a Personal Care Assistant.

This contract may be terminated upon \_\_\_\_\_ days notice by either party. After such notice is given, both parties agree to continue working together according to the approved schedule until the notice period is over, unless a shorter time is mutually agreed upon. This contract may be modified at any time upon mutual agreement of either party.

\_\_\_\_\_/\_\_\_\_/\_\_\_\_

Applicant's Signature

Date

\_\_\_\_\_/\_\_\_\_/\_\_\_\_

Employer's Signature

Date

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# DETAILED CONTRACT

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## EMPLOYMENT AGREEMENT

This Agreement for Services is intended to serve the purpose of defining the scope and terms of the engagement of the following individual:

Full Name: \_\_\_\_\_ Phone No.: \_\_\_\_\_  
Address: \_\_\_\_\_ Pager No.: \_\_\_\_\_  
Apt. No.: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

hereinafter referred to as "Employer", and:

Full Name: \_\_\_\_\_ Phone No.: \_\_\_\_\_  
Address: \_\_\_\_\_ Pager No.: \_\_\_\_\_  
Apt. No.: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

hereinafter referred to as "Employee".

### 1. EMPLOYMENT

Employer hereby employs Employee, and Employee hereby accepts employment upon the terms and conditions hereinafter set forth.

### 2. TERM OF EMPLOYMENT

Subject to the provisions of termination hereinafter provided, the initial term of this Agreement shall begin on \_\_\_\_\_, 199\_ and terminate on \_\_\_\_\_, 199\_. This Agreement may be renewed for successive one-year terms.

### 3. DUTIES

Employee is engaged as a Personal Care Assistant, hereinafter referred to as "PCA". Employee is charged with the provision of the services required by Employer as set forth in Addendum "A" attached hereto and such other duties as may be from time-to-time be required by Employer.

### 4. EXTENT OF SERVICES

Employee shall devote all of Employee's time, attention and energies to Employer's during the working hours as set forth in Addendum "B" attached hereto.

### 5. COMPENSATION

#### A. Base Salary

(1). During the initial term of this Agreement, Employer agrees to compensate Employee with a base salary of \$\_\_\_\_\_ per hour, payable bi-weekly.

(2). The compensation provided for above shall be subject to negotiation to effect changes in Employee's compensation for the next successive one-year term. Such negotiation shall begin between the parties no later than 30 days prior to the termination of the initial term and any successive terms of this Agreement. In the event Employer and Employee are unable to agree as to the compensation to be paid to Employee during the next successive term of this Agreement, this Agreement shall terminate at the end of the then current term.

(3). If a change in compensation is made, it shall be made by entering the change on an amendment to this Agreement. The amendment shall be duly signed by the Employer and Employee. Any amendment to this Agreement shall be effective as of the date of the entry and shall supersede the compensation provided for in Subparagraph A(1) above and any other change or changes in compensation previously entered on an amendment.

#### B. In-kind Compensation

- (1). Employer agrees to provide Employee with suitable quarters and meals.
- (2). Employee shall have the use of Employer's laundry facilities.
- (3). Employee may use Employer's telephone for local calls. Employee shall reimburse Employer for long distance calls.

#### 6. EXPENSES

The parties recognize that in the course of the Employee performing the duties required hereunder and in furtherance of Employer's interests, Employee may necessarily incur expenses. Employee shall be entitled to reimbursement for use of Employee's personal vehicle, transportation by common carriers, meals, lodging, entertainment and other expenses so incurred by Employee and directly related to Employer's interest's. However, no such reimbursement under this Paragraph 6 shall be made unless Employee shall provide Employer with an appropriate receipt or such other document as may be required by Employer.

#### 7. VACATION

During the initial term of this Agreement, Employee shall have one week unpaid vacation. The vacation provision of this Paragraph 7 shall be subject to renegotiation as provided in Subparagraph A(2) of Paragraph 5 above pertaining to renegotiation of compensation. Vacation time shall not be cumulative from year to year.



8. SOCIAL BEHAVIOR:

A. The use of illegal drugs and the abuse of alcohol by Employee is prohibited and shall be cause for immediate termination.

B. The use of alcohol and tobacco and the utterance of profanity and racial slurs shall not be tolerated in Employer's residence or when Employee is in attendance with Employer in a social setting outside of Employer's residence.

C. Employee may invite guests when given permission by Employer.

9. USE OF EMPLOYER'S PERSONAL PROPERTY:

A. When instructed or given permission by Employer, Employee may use Employer's personal property.

B. Employee shall exercise due care in the use of Employer's personal property and shall be held responsible for any loss or damage.

10. TERMINATION:

A. In addition to any other termination provisions in this Agreement, this Agreement may be terminated as follows:

(1). Immediately by Employer for cause, including, without limitation, Employee's disloyalty, misconduct, failure or refusal to faithfully and diligently perform the provisions of this Agreement, or commission of a criminal act.

(2). By mutual agreement in writing between Employer and Employee;

(3). Automatically and immediately upon the death of Employee;

(4). By Employee, without cause, upon 30 days written notice by Employee to Employer.

B. In the event of termination of this Agreement and employment as provided in this Subparagraph A above, Employer's only obligation under this Agreement is to pay to Employee the compensation to which Employee is entitled to the end of the pay period in which the termination of employment occurs. After the payment described in the immediately preceding sentence, Employer shall have no further financial obligation to Employee pursuant to this Agreement.

C. Upon termination of this Agreement and employment for whatever reason, Employee immediately shall return any and all of Employer's property in Employee's possession to Employer.

11. INDEBTEDNESS OF EMPLOYEE:

A. If during the course of Employee's employment hereunder,

Employee becomes indebted to Employer for any reason, Employer shall, if Employer so elects, have the right to set off and to collect any sums due from Employee out of any amounts which Employer may owe Employee.

B. In addition to the provisions of Subparagraph A above, if Employee's employment hereunder terminates for any reason, including Employee's discharge, death, illness or incapacity, or upon the expiration of this Agreement according to its terms, all sums owed by Employee to Employer shall become immediately due and payable.

12. ASSIGNMENT

Employer depends upon the personal services of Employee, and Employee shall not assign this Agreement or any rights hereunder without the express written consent of Employer, nor shall Employee delegate any of the obligations of Employee hereunder to any other person or corporation without the express written consent of Employer. Any assignment or delegation by Employee without such written consent shall be void.

13. NOTICE

Any notice required or permitted to be given under this Agreement shall be sufficient if in writing, and if sent by certified mail to Employee's residence as stated on Employee's Job Application, or to Employer's residence as shown above or to such other addresses as the parties may direct in writing.

14. EMPLOYMENT TAXES AND WORKERS COMPENSATION

Employer shall be responsible for filing all forms and reports required by the Internal Revenue Code and for paying the employment taxes due in a timely manner. Employer shall deduct the Employee's share of such taxes and any amounts due for Employee's income taxes withheld, based on Employee's election, for the pay period from the Employee's pay.

Employer shall obtain and maintain workers compensation insurance as required by the State and provide proof of same to Employee.

15. MISCELLANEOUS

This instrument contains the entire agreement of the parties. It may not be changed orally. It may be changed by an agreement in writing signed by the party against whom enforcement of any waiver, change, modification, extension or discharge is sought. The waiver by a party of a breach of any provisions of this Agreement shall not operate or be construed as a waiver of any subsequent breach by any party. This Agreement shall inure to the benefit of and be binding upon the parties hereto and shall be construed under (insert state name) law.

IN WITNESS WHEREOF, the parties hereto have executed this Agreement this day of \_\_\_\_\_, 199\_\_ .

"Employer" \_\_\_\_\_

"Employee" \_\_\_\_\_

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## SAMPLE PCA SCHEDULE

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**WEEK OF:** \_\_\_\_\_

|       | MONDAY   | TUESDAY | WEDS     | THURS | FRIDAY   | SAT      | SUN      |
|-------|----------|---------|----------|-------|----------|----------|----------|
| 8:00  | XXXXXXXX |         | XXXXXXXX |       | XXXXXXXX |          | XXXXXXXX |
| 8:30  | XXXXXXXX |         | XXXXXXXX |       | XXXXXXXX |          | XXXXXXXX |
| 9:00  | XXXXXXXX |         | XXXXXXXX |       | XXXXXXXX |          |          |
| 9:30  | XXXXXXXX |         | XXXXXXXX |       | XXXXXXXX |          |          |
| 10:00 |          |         |          |       |          |          |          |
| 10:30 |          |         |          |       |          |          |          |
| 11:00 |          |         |          |       |          |          |          |
| 11:30 |          |         |          |       |          |          |          |
| 12:00 |          |         |          |       |          |          | XXXXXXXX |
| 12:30 |          |         |          |       |          |          | XXXXXXXX |
| 1:00  |          |         |          |       |          |          | XXXXXXXX |
| 1:30  |          |         |          |       |          |          | XXXXXXXX |
| 2:00  |          |         |          |       |          |          | XXXXXXXX |
| 2:30  |          |         |          |       |          |          | XXXXXXXX |
| 3:00  |          |         |          |       |          |          |          |
| 3:30  |          |         |          |       |          |          |          |
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| 8:00  |          |         |          |       |          |          |          |
| 8:30  | XXXXXXXX |         | XXXXXXXX |       | XXXXXXXX |          |          |
| 9:00  | XXXXXXXX |         | XXXXXXXX |       | XXXXXXXX | XXXXXXXX |          |
| 9:30  | XXXXXXXX |         | XXXXXXXX |       | XXXXXXXX | XXXXXXXX |          |
| 10:00 |          |         |          |       |          | XXXXXXXX |          |
| 10:30 |          |         |          |       |          |          |          |
| 11:00 |          |         |          |       |          |          |          |

**TOTAL HOURS:** \_\_\_\_\_

**Signature** \_\_\_\_\_

## PCA TIME SHEET

WEEK OF: \_\_\_\_\_

|       | MONDAY | TUESDAY | WEDS | THURS | FRIDAY | SAT | SUN |
|-------|--------|---------|------|-------|--------|-----|-----|
| 8:00  |        |         |      |       |        |     |     |
| 8:30  |        |         |      |       |        |     |     |
| 9:00  |        |         |      |       |        |     |     |
| 9:30  |        |         |      |       |        |     |     |
| 10:00 |        |         |      |       |        |     |     |
| 10:30 |        |         |      |       |        |     |     |
| 11:00 |        |         |      |       |        |     |     |
| 11:30 |        |         |      |       |        |     |     |
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| 9:00  |        |         |      |       |        |     |     |
| 9:30  |        |         |      |       |        |     |     |
| 10:00 |        |         |      |       |        |     |     |
| 10:30 |        |         |      |       |        |     |     |
| 11:00 |        |         |      |       |        |     |     |

TOTAL HOURS: \_\_\_\_\_

SIGNATURE: \_\_\_\_\_

# RECORD KEEPING



- **What You Should Know About Your PCAs**
- **What Should You Keep**
- **Disclosure**
- **Termination Procedures**

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# WHAT YOU SHOULD KNOW BEFORE EMPLOYING PCAs

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## Keeping accurate records is IMPERATIVE !

**Purpose:** To keep on each PCA for future reference and to protect your interests in the event that someone questions your actions.



**Strategy:** Keep a personal file on each PCA so that you can avoid the “he said/she said” scenario. These records should be kept together and easy for you to access. It may be easier for you to keep these records on a computer. However, some paperwork can not be eliminated completely.



All employers are required to keep records of their employees no matter how brief they stay on the job. In the future you may be asked to give a work reference for a former PCA and you will have all the documentation you need at your fingertips without having to rely on your memory for the information.

### **Before your PCA starts working you should have the following information:**

|                                                 |                   |                          |
|-------------------------------------------------|-------------------|--------------------------|
| Full Name                                       | Full Address      | Phone # (with area code) |
| Social Security #                               | Drivers License # | Auto License Plate #     |
| Visa or Green Card #                            |                   |                          |
| Emergency Info - Names, Relationship, Phone # s |                   |                          |
| Health Insurance Carrier & Policy #             |                   |                          |
| References                                      |                   |                          |

In case of an emergency or unexpected absence this information gives you something to start with in resolving the issue. Most of these items are needed on the application to help you do a thorough background check before you turn over your house keys to a stranger. One piece of information can be cross checked with another to insure accuracy.

As your new PCA works for you be sure to keep up with daily or weekly entries on their job performance. This also helps to document conflicts and problems as you go along in case you need to replace or fire a PCA. Bitter, angry, and hurt feelings can become a lawsuit for discrimination or

retaliation. Documentation can help support your claim and solidify your position. Many PCA employers are victims of theft and the more accurate the records you keep the better chance you have of recovering stolen items or money. You may find that you are the one who brings a lawsuit against a PCA employee but those incidents are rare at best.



## WHAT SHOULD YOU KEEP

**For business reasons** the documents to keep on ALL employees are:

|                               |                                          |                              |
|-------------------------------|------------------------------------------|------------------------------|
| <b>Timecard Records</b>       | <b>Tax Forms</b>                         | <b>Performance Reviews</b>   |
| <b>Social Security #</b>      | <b>Green Card Copies (if applicable)</b> |                              |
| <b>Application Forms</b>      | <b>Contract</b>                          | <b>Offer Letter Copy</b>     |
| <b>Vacation Request Forms</b> | <b>Emergency Ph #</b>                    |                              |
| <b>Insurance Card Copies</b>  | <b>Reference Letters</b>                 | <b>Certificates (CPR/FA)</b> |

**Personal documents you should keep are:**

**Rent Receipts (3 YRS)      Utility Stubs (3 YRS)      Past Tax Forms (3-7 YRS)**  
**Store Receipts (1-3 YRS)      Warranty Information      Insurance Policies**  
**Credit Card #s      Credit Statements (1 MO)      Bank Statements (1 MO)**  
**Credit Report (1 YR) Medical Bills (with tax info) Prescription Info (5 YRS)**  
**Vehicle Repair Receipts (till you replace the vehicle)**

I'm sure you have many other documents that you keep like a birth certificate, awards you have won, and other policies, or certificates but that is your own choice. You may be called upon to produce the above-mentioned documents at some point in your life. For this reason I advise you to talk to a financial professional to get up-to-date advice from a professional.



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# DISCLOSURE

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I think it is necessary to cover disclosure of information at this point. Because of the personal nature of the job the person with the disabilities may feel comfortable enough with a PCA to talk about things of a personal nature about other PCAs he/she has employed. **BAD MOVE !!!! WHILE YOU ARE WORKING WITH ONE PCA NEVER DISCUSS YOUR OTHER PCAs WITH THEM.** You may unintentionally say things that are private to you and the other PCA.

Your records should be strictly confidential and each PCA (employee) must feel that his/her information will remain in confidence.

Hard copies of all records should be kept in a LOCKED file box, and computer programs should be password protected. If you use a computer always back up your files to a floppy disk and keep the disks in your locked box. This is your private business information and these precautions will help to prevent someone from altering the information without your knowledge. The PCA need not be present when updating information.

**The more you know about the PCA the more problems you can avoid.**

**Remember, this is your private business!**

**YOU ARE AN EMPLOYER AND EMPLOYEE INFORMATION  
SHOULD BE KEPT CONFIDENTIAL!!!**

If you are an employer with integrity you will have fewer problems and a lower turnover rate. A good employee is loyal to a good boss.

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# PCA TERMINATION

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Even though we would like to think the PCA that we hire will stay with us forever and we will never have to go through this process again it is unrealistic to believe it.

## **Purpose:**

To maintain the quality of life that you worked so hard to achieve.

## **Strategy:**

To end the employer/employee relationship as quickly, easily, painlessly and as friendly as possible.

Some of the issues surrounding the termination are straightforward and others are vague. They all, however, must be taken seriously. A spur-of-the-moment temper tantrum will only bring you legal trouble and could put your life at risk. Your well being is the first consideration in any PCA relationship since the employer is often very vulnerable.

Remember, you have a legal contract to employ a worker and it is there to protect the worker's interests as well as yours. Any action you take must be carefully considered first.

Points to remember are as follows:

A. You have the right to terminate any assistant if:

- You are dissatisfied with their work
- Your schedule changes and is incompatible with theirs
- There is neglect or abuse
- Your living arrangements change (move away or change to live-in help)
- Changes in your personal relationship make it impossible to maintain a professional relationship
- Changes in your physical condition makes it necessary to change the services you require

**Your PCA's have the right to quit for all the same reasons.**

**B.** Except for extreme cases, you and your PCA are required to give one another two weeks notice of the desire to terminate employment. Extreme cases may include abuse, theft, frequent absences or tardiness, and unauthorized check writing. Among these examples dishonesty and theft are the most common.

Other factors which can result in immediate termination are family emergencies or unexpected hospitalizations.

**C.** If you are not on friendly terms with your PCA don't be intimidated by him/her. If you anticipate problems it would be wise to have another able-bodied person present when you fire him/her. In the event the PCA is a live-in, you can have a "stand-by" police officer come to your home while the PCA moves out. Either way you handle it, try not to anger the PCA so your safety is not threatened in any way.

**D.** Think ahead of time and use good judgement as to whether you will need a back-up PCA during the time between your termination notice and the date he/she actually leaves. It is quite possible that your PCA will not come to work after you give him/her notice. **BE PREPARED.**

**E.** Be sure to recover keys and other belongings of yours the PCA may have before he/she stops working for you. If a former PCA employee still has keys to your home you should consider changing all your door locks.

#### **Top ten reasons PCA's quit their jobs are:**

1. Their initial job description (duties/tasks) was incomplete or keeps changing.
2. The method and order in which the PCA must perform the duties is illogical, inefficient, and wastes time.
3. Their working environment is messy, unpleasant, disorganized, etc.
4. They are not paid enough, don't get proper raises or don't feel their work is appreciated.
5. Their boss (you) is either too passive or too aggressive in his/her style of interaction. (communication skills)
6. They feel another PCA is favored over them.
7. The employer is dishonest about the hours they work, the salary owed, or has inappropriate expectations such as monetary loans or sexual favors.
8. There are unreasonable duties (ones the employer can do alone), those which can not be done in the allotted time, or they are too closely supervised.

9. The employer is intolerant of honest mistakes, the need for sick time, etc.
10. The employer doesn't respect PCA's personal life and expects that his/her needs should take priority over all else in the PCA's life.

Firing an employee is a difficult task for anyone to do and there is no secret formula to make it easier. The best advice is to select your PCA's carefully to decrease your chances of having to fire them later.



# **MAINTAINING A GOOD RELATIONSHIP WITH YOUR PCA**

- **Communication**

**Stop,  
Look,  
Listen**

- **Defining the Problem**
- **Problem Solving**
- **Assertive vs. Aggressive**

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# COMMUNICATE EFFECTIVELY WITH YOUR PCA

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**Good communication skills are necessary if the relationship with your PCA is going to be successful.**

The employer/PCA relationship is very sensitive because of the personal nature of the work. Keeping a line of communication open and honest will benefit both of you.

## **Purpose:**

To create a positive experience for both parties and maintain a professional work environment.

## **Strategy:**

The following are strategies for the employer to consider while communicating with the PCA. Be assertive, not aggressive.

**This is a brief list of things to remember:** you may want to add more as you go through them:



**STOP** – before you speak consider the impact of the message



**LOOK** – for alternative solutions to problems

**LISTEN** – *Really* listen to what the other person is saying

- **BE ASSERTIVE NOT AGGRESSIVE**
- State your feelings and observations without emotions
- State your message clearly and to the point

- **CORRECT IN PRIVATE, PRAISE IN PUBLIC**
- **BUILD** – self-esteem, never use words that attack
- Make the PCA aware that his or her job is important
- **REMAIN**- tactful, and calm
- Resolve problems,  
find solutions,  
and deal with changes together

Allow the PCA to communicate feelings about difficult situations openly. If you continue to allow the PCA to share his or her feelings about required tasks, you will have a longer and more satisfying relationship.



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# DEFINE THE PROBLEM

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*Make sure each person has a clear view of the problem.* A misunderstanding of the problem itself will delay any attempts to resolve it. Resolve each point as you go along so you don't keep rehashing old stuff. If you can, write down things you want to discuss and refer to your list often throughout the conversation. That way you will cover everything you wanted to say and you won't have to discuss it later.

Once a problem has come to an acceptable resolution let it go. Never bring it up again so you won't open old wounds.

**LET THE PAST STAY IN THE PAST.** Let resolved conflicts go, never to be revisited again.

**NEVER, NEVER, NEVER** bring up past issues that have already been resolved. Put them away quietly in the back of your mind or, better yet, make note of them in your employee file. That way, if the issue or problem reoccurs, you can go back and remind them of the previous agreement for resolving it.

If the issue is termination you may want to have someone else with you at the time of notice. Even though people are basically good hearted, when you are being told your services are no longer needed, it can be a very emotional time. It is better for you to have a witness with you today than to be a victim of retaliation in the headlines tomorrow.

## PEOPLE CAN BE UNPREDICTABLE

No matter how well you think you know someone you can be surprised, especially during times of change and stress.

**The bottom line is to always keep communication lines open between you and your PCA's.**



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# PROBLEM SOLVING

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**The first step in problem solving is to eliminate distractions.** Turn off the TV; let the dog outside for a while; unplug the phone; ask others to leave you alone for a while; and shut the door. The messages you will send won't get sidetracked during the discussion and more will be accomplished.

## **ALLOW PLENTY OF TIME TO TAKE CARE OF ISSUES, NOW!**

Take turns when discussing a problem. Remember, **nothing is ever one-sided**. Be sure each of you has time to state your views, but try to keep the discussion from going in circles. If you seem to keep going back to the same points, it is an indication that the issue was not satisfactorily resolved. Stop skirting the issue, resolve it, and move on.

**Sometimes it is a case where you can agree to disagree.** Remember, you don't have to share the same opinions about things, it's okay. But when it is an issue that undermines your authority it's not okay! For example; If your PCA wants to prepare the meal in the microwave instead of the oven, so what? He/she doesn't have to agree that it is the right way but if you don't let him/her voice an opinion it could become a major sore spot in your relationship. You both must state your opinion to negotiate a resolution to the problem. By rights, the PCA is there to follow your instructions exclusively, however, a good employer sometimes yields to the employee's requests.

If you have an issue regarding a live-in PCA having too many friends over, which makes you uncomfortable, you must remember whose house it is. You are the boss/employer. Simply request that it be stopped. Don't let the PCA intimidate you or ignore you. Talk about your feelings and simply state that in your house, these are your rules, and state the consequences of breaking the rules. The PCA will either apologize for the inconvenience, negotiate amending the rules a little, or agree to move out. Hopefully that is a worse case scenario, but it could happen. Either way the problem is solved.

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# ASSERTIVE vs. AGGRESSIVE

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## You are neither a Mouse nor a Tiger

Do you have trouble expressing your feelings and opinions to others? Learn to stand up for yourself. Many times, it is simply easier to keep your mouth shut and let the world evolve, as it will. Other times you simply must say “I’m mad and I’m not going to take it anymore!” How do you decide which way to handle things? The following guidelines will help you decide. The secret is to have it your way, without everybody thinking you are a jerk. This depends on the way you present yourself and **how** you speak to others.

### **Purpose:**

Having things your way without upsetting everyone around you.

**MANNERS & COURTESY will get the desired response every time.**

### **Strategy:**

Learning how to rearrange everyone’s ideas to match yours without pushing people around  
and learning how to be loved, not left behind.

Being assertive means speaking up for what you believe. If you want something don’t just sit there like a bump on the proverbial log, **SPEAK UP AND ASK**. Don’t just sit and wait for help opening a door, **STOP SOMEONE AND ASK THEM TO OPEN IT FOR YOU**. Assertiveness training can help you express yourself in a manner that neither sells yourself short nor threatens others.

**BEING DISABLED IS NOT A CRIME ANY MORE THAN ASKING SOMEONE TO STOP AND HELP US.**

The problem in dealing with people isn’t **that** you asked for help, the problem is **HOW** you asked for the help.

**Here are some examples of being aggressive as opposed to being assertive:**

**Aggressive:** “Hey, open this door for me.”

**Assertive:** “Excuse me, would you open this door for me please?”

**Aggressive:** “Turn that noise down.. It’s so loud I can’t even hear myself think.”

**Assertive:** “I’m having a hard time concentrating with the radio so loud. Do you think you could turn it down a little?”

**Aggressive:** “Go pick up the book I dropped.”

**Assertive:** “I dropped a book over there, would you put it back on the table for me please?”

**Aggressive:** “I’m the boss so I say you have to get me dressed before you fix breakfast.”

**Assertive:** “According to the routine sheet I gave you when you started, it says to dress me first, then breakfast comes later. Was this list unclear? Is there a legitimate reason you want to alter the routine? Can I help you understand it better?”

To be effective, as intended, all of these assertive comments must NOT be said in a tone of voice that is disrespectful, curt, or rude.

By now you can see a big difference in the way a PCA, or anyone would react to different styles of speech. When you were growing up did your mother ever say to you, “It’s not what you say, but how you say it” and “It’s your tone of voice.” Some kids can’t wait to grow up so they can be the boss and be able to order others around without consequences. **The problem is that there are always consequences to inappropriate behavior.** When they become adults they can get power happy and become the pushy, know-it-all jerks that we all love to hate.

This is a trap that many people fall into when life hands them stressful challenges, like dealing with a disability. Nobody teaches you coping skills for disability, yet everybody seems to have advice. Does this sound familiar? Well, I don’t have advice for you, I can only tell you what has worked for me and other people that I have learned from. Then you can develop your own style which works best for you.

**Some points to ponder are :**

3. **It is easy to manipulate circumstances, and get your needs met, if people respect you.** You gain respect by treating others respectfully.
4. **Remember, your frustrations are yours alone.** No one can feel them or understand them but they can relate their own frustrations to them. It is not your job to make everyone else frustrated just because you are. That is not the way to gain respect. Tell a friend your problems, or tell a counselor, don't tell your employees.
5. **Kindness and courtesy is like icing on the cake.** You can't reveal your heart of gold unless you show others an attractive demeanor first. Behavior and language can either attract or repel others. Most employers won't tolerate temper tantrums and swearing in the workplace and you shouldn't either. Just the same, if you behave this way you can't expect your PCA to behave any differently. If you want a PCA to stay with you, you must give them a reason to want to stay. Even though the work they do is often not the most pleasant job in the world, the workplace should be pleasant.
6. **If done correctly, speaking up for yourself can be a totally non-aggressive action and it will earn you the respect of others.** You are nobody's doormat but you do have opinions, needs, wants, and desires that need to be expressed. Go for it. Just remember the rules of proper behavior.

#### **BASIC STRATEGIES FOR BEHAVING MORE ASSERTIVELY**

1. Identify your personal rights, wants, and needs.
2. Identify how you FEEL about a particular situation, (e.g., "I feel angry", "I feel embarrassed", "I like you".) In identifying your feelings about a situation, use sensory descriptions that help you capture what you feel, (e.g., "I feel stepped on", "I feel like I'm on cloud nine".) Report what kind of action the feeling urges you to do, (e.g., "I feel like hugging you".)
3. In describing your feelings, use "I" messages; own your message. Use the "I" statements to express your feelings instead of evaluating or blaming others, ("I feel hurt" vs. "You hurt me" or "You are inconsiderate".)
4. Connect your feeling statement with some specific behavior in the other person, (e.g., "I felt hurt when you left without saying goodbye" vs. "I felt hurt because you were inconsiderate".)

5. Be direct – deliver your message to the person for whom it was intended. Express your request in one or two easy to understand sentences.
6. Try not to make assumptions about what the other person is thinking or feeling, about what their motives are, or about how they may react. Check things out with them first. You can **anticipate** those things but don't always **assume** they will happen that way.
7. Avoid sarcasm, character assassination, or absolutes (e.g. using words like, “you never...”, “you always...”, “you constantly...”, etc.).
8. Avoid labeling.
9. Avoid statements beginning with “Why?”, “You...”. This may put the other person on the defensive.
10. Ask for feedback. “Am I being clear?”, “How do you see the situation?”. Asking for feedback helps to correct any misconceptions you may have, as well as helping others realize that you are open to communication, and are expressing an opinion, feeling, or desire, rather than a demand.
11. Evaluate your expectations. Are they reasonable? Be willing to compromise.

## **BE YOUR OWN BEST ADVOCATE.**

# **WELLNESS HEALTH & LEISURE**

- **Wellness begins with**

**‘ATTITUDE’**

Taking Responsibility for  
Yourself

- **Leisure Planning**
- **Benefits & Discounts**

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# WELLNESS BEGINS WITH ‘ATTITUDE’

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You may be wondering how wellness fits into a course for managing PCA's. Part of taking care of your physical well being includes taking care of your emotional and mental well being. Attitude plays a major part in your health **and** your success in dealing with an employer/employee relationship.

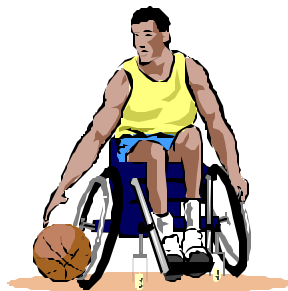
If you have a high turnover of PCAs you may find your answer to “why” by looking in a mirror. Before you can deal with others you need to get a handle on you and what you are all about. If you are unhealthy, you are unhappy. If you are unhappy, you become hard to work with as an employer.

**Ask yourself; “Who wants to work with a grumpy ol’ boss?”**

The job is no fun, the boss is a grouch, and the workplace is depressing. How long do you think a PCA will stay at a job like that? Probably about a week!

**Also, if your health deteriorates the chances of continuing to live independently will diminish.**

Your prospects for good health and long life are remarkably dependent upon mental habits learned in childhood. These attitudes cause emotional reactions that strongly effect your immune system, circulatory system, and even your risk of accidents. The strength of this relationship between attitude and health, have been grossly understated by the medical profession. In 1973 a study on attitudes revealed that subjects with a positive attitude were up to thirty times more likely to be alive in twenty-one years than those with a negative attitude. **THIRTY TIMES MORE LIKELY TO BE ALIVE IS AN**





## AMAZING STATISTIC!

### Aspects of life that help us to take control

The following are excerpts taken from a talk by Dr. Larry Sayre in Tucson, AZ.

1. **BEHAVIOR** - The strongest influence on our success or failure is our behavior. The right behaviors will determine our success at the moment, and over time, our success in life. “In most cases, if you do the right thing, you are going to achieve the right result.”
2. **FEELINGS** – “Every action we take is filtered through our feelings first. How we feel about something will always determine, or effect, what we do and how we do it.” Your behavior is more likely to be the right behavior on your good days than on a bad day of negative feelings when you will experience more failures than successes.
3. **ATTITUDES** – “Your attitudes are the perspectives from which you view life. Whatever attitude we have about anything will effect how we feel about it, which in turn determines how we will act about it, and that in turn determines whether or not we will do well.” Think about what it means to, “have a bad attitude.”
4. **BELIEFS** – Where do our attitudes come from? What we believe about anything will determine our attitude. If you believe that you are not likable, you may view your world as a hostile place. This may result in striking out at others in an angry way. That angry behavior is not likely to result in successful endeavors. Remember, it doesn’t have to be true; you just have to believe it to be true.
5. **PROGRAMMING** – We believe what we are programmed to believe... It all starts with our programming. What we have accepted from the outside world, or fed to ourselves, has initiated a natural cause and effect chain reaction sequence, which cannot fail to lead us to successful self-management or to the unsuccessful mismanagement of ourselves, our resources, and our futures.

**PROGRAMMING CREATES BELIEFS**

**BELIEFS CREATE ATTITUDES**

**ATTITUDES CREATE FEELINGS**

**FEELINGS DETERMINE ACTIONS**

**ACTIONS CREATE RESULTS**

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# TAKING RESPONSIBILITY FOR YOURSELF

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You are your own best friend. Keeping your own head straight will eliminate many problems BEFORE they occur.

## **Purpose:**

To maintain well being, balance in your life, and control of your environment.

## **Strategy:**

Use Self-Talk or positive affirmations to maintain a good attitude and eliminate stress that comes from a lack of self-confidence.

When things don't go well or when we make normal errors in judgement, as humans we tend to beat ourselves up about it even when others have dismissed the incidents. It does no good to ponder over what we WOULD'VE, COULD'VE, or SHOULD'VE done. And forget thinking about the "IF ONLYs". They are the deadliest thoughts to a good frame of mind. And remember "THE OTHER GUY"? We blame the other guy when things go wrong and never learn from 'his' mistakes.

The following is an excerpt from "What to Say When You Talk to Your Self", by Shad Helmstetter, Ph.D. It contains phrases to help you keep on track so you won't get rattled when things don't go your way. Read them, or say them aloud to yourself daily:

- I take full responsibility for everything about me- even the thoughts that I think. I am in control of the vast resources of my own mind.
- I alone am responsible for what I do and what I tell myself about me. No one can share this responsibility with me.
- I also allow others to accept their responsibilities for themselves and I do not try to accept their responsibilities for them.
- I enjoy being responsible. It puts me in charge of being me, and that's a challenge I enjoy.
- I allow no one else, at any time, to assume control or responsibility over my life or over anything I do. My responsibility to others is an extension of my own responsibility to myself.

- I choose to leave nothing about me up to chance. When it comes to me, and anything in my life, I choose to **CHOOSE**.
- My choices are mine alone to make for myself. I do not, at any time, allow anyone else to make my choices for me. I accept full responsibility for every choice and decision I make.
- I am trustworthy. I can be counted on. I have accepted a winning responsibility for myself, and I always live up to the responsibilities I accept.
- I accept responsibility for living my life in a way which creates my strengths, my happiness, my positive, healthy beliefs, and for my past, my present, and my future.

I could go on forever with catchy phrases you could tell yourself for positive reinforcement. However, I believe these are the most helpful in maintaining the Independent Living Philosophy and keeping you on the right track with your relationships with others, including your PCAs.

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# LEISURE PLANNING

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When you are dividing up the duties among your PCAs, morning, daytime, nighttime, weekends, etc. why not hire a PCA for leisure assistance.

## **Purpose:**

To maintain a healthy balance of activities in your life to improve your well being.

## **Strategy:**

Plan leisure time into your PCA's schedule, or hire an assistant for vacations, weekend outings, hobbies, etc.

## **Getting away from it all not only benefits the able bodied but it benefits all people.**

It is especially important to those who are limited in their ability to travel freely without assistance. Taking a break from stress is a major ingredient in the formula to a healthier and happier life. It can be very stressful if you are constantly thinking about whether your morning PCA will be on time so you can get to that early class or meeting. I'm not saying don't worry about it, you need to, but unless you plan some leisure time those worries can become all consuming and turn you into a miserable human being.

You deserve a break. Make time to go to a movie, or play, or even fishing in a nearby city park. What ever you like to do, make time for it ! If you need assistance to help you, hire someone

who knows how to assist you in case you need to use the rest room, or help you eat in a restaurant.

**The possibilities are limited only by your imagination. But you must work leisure into your schedule with your PCAs.**

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## BENEFITS & DISCOUNTS

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**Believe it or not there are some “perks” to traveling with a disability.**

**Purpose:**

To encourage you to reach out and live life to its’ fullest potential.

**Strategy:**

Speaking up and **asking** for discounts encourages organizations to make more of them available.  
Unused programs soon disappear.

Oftentimes companies will give discounts to assistants traveling with people with disabilities. They won’t if you don’t **ask**. You should go through a travel agent, though.

**Travel Agents:** They are great at pulling strings and getting information unavailable to the traveler who makes his/her own arrangements. A travel agent knows how to get the best prices and how to get companion fares quicker and easier, (airlines usually won’t tell you about them). If you do inquire for yourself be sure to **ask** for, “companion fares”, senior, or disability discounts.

**Commercial Airlines:** Discounts are often left to the discretion of the reservations operator. Within limits they are able to ‘offer’ all kinds of services and reduced fares.

**Tourist Destinations:** Discounts vary but you need to **ask** if they are available. The National Park Service offers several kinds of ‘lifetime’ passes to seniors and people with disabilities, **and their companions**. With the pass you (and all who are in your vehicle) can visit any national park without paying an entrance fee, and get discounts in their gift shops. The Golden Access Passport can be obtained from any park ranger office free of charge.

**Discounts are available for the asking !**

# Safety First, and Always

- **Medical Emergency Information**
- **Emergency Sheet**
- **Home Security / Personal Safety**

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# MEDICAL EMERGENCY INFORMATION

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**Take a lesson from the Boy Scouts and adopt the motto “Be Prepared”.**

Unfortunately we cannot predict when illness and accidents will occur.

**Purpose:**

To have useful emergency information available about yourself in case you are unable to communicate yourself.

**Strategy:**

Have an Emergency Information Sheet (EIS) available to anyone in your home whether they are residents or visitors which can be used easily and clearly.

A good example of an EIS is included in this chapter, though, you may want to add pertinent information to it that relates to your lifestyle and needs.

**Make this information available to people with whom you have regular contact, make sure they know about it, and can access it.** This includes all PCAs, roommates, family members, and friends. You should also carry one with you in your backpack, wallet, or purse, and place one by the telephone in your home.

**IT COULD SAVE YOUR LIFE**





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# EMERGENCY SHEET

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Name: \_\_\_\_\_ Date of Birth: \_\_\_\_/\_\_\_\_/\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_

Home Ph #: (602) \_\_\_\_\_ Work #: \_\_\_\_\_

Pager #: \_\_\_\_\_

## Emergency Numbers and Information:

Primary Care Physician: \_\_\_\_\_ Ph #: \_\_\_\_\_

Preferred Hospital: \_\_\_\_\_ Ph #: \_\_\_\_\_

Disability Information: \_\_\_\_\_

Medications Taken Regularly : \_\_\_\_\_

Allergies: \_\_\_\_\_

## People to Contact in an Emergency:

1<sup>st</sup> \_\_\_\_\_ Home # \_\_\_\_\_

Relationship \_\_\_\_\_ Pager # \_\_\_\_\_

2<sup>nd</sup> \_\_\_\_\_ Home # \_\_\_\_\_

Relationship \_\_\_\_\_ Pager # \_\_\_\_\_

## Insurance Information

Company Name: \_\_\_\_\_

Medical Group: \_\_\_\_\_

Group ID: \_\_\_\_\_ Member ID: \_\_\_\_\_

Member Services Ph #: \_\_\_\_\_

Pre-Certification: # \_\_\_\_\_

Pharmacy Name: \_\_\_\_\_ Ph #: \_\_\_\_\_

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# HOME SECURITY / PERSONAL SAFETY

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**The one thing you must remember is to never let your guard down**  
and, with practice, you can do it without being obvious or paranoid about it.

**Purpose:**

To maintain your independence means to not lose control of your actions, life, or home.

**Strategy:**

Always be in control. You decide who enters your home, and you decide who does not.

**Be self-confident!**

Being a disabled person in an able-bodied world is a very vulnerable position to be and to remove some of that vulnerability you must be aware where your weaknesses are.

**BEING INDECISIVE** is the most damaging aspect of that vulnerability. If you show others that you can't make a decision they will naturally try to make the decision for you.

Therefore, you have chosen to give up control to others.

**HOWEVER, BEING SELF-CONFIDENT** is the best way to show you can handle control. Just being able to make decisions is not good enough, they must be good, well thought out, and sound decisions. Decisions that won't put your life or safety at risk.

Hiring a PCA because he/she is nice, and seems willing to do the job, doesn't mean that he/she won't steal from you or harm you in any way. You must do your homework when hiring first, then follow up daily to make sure he/she never puts you at risk. For example, common sense says not to leave a stove unattended while cooking, but people do it all the time. That puts you and all your belongings at risk for fire.

In the book called The Gift of Fear by Gavin DeBecker, he lists some PINs (Pre-Incident Indicators) that should send up a red flag when it comes to finding out which people to avoid.

## **They are, as follows:**

### **1. FORCED TEAMING**

Projection of a shared purpose or experience where none exists. Inappropriate use of the word “we”. Example: “We’re some team!” The defense against this is a clear refusal to accept the partnership.

### **2. CHARM AND NICENESS**

One often hears “he’s so nice”, or “he was just charming”. Think of charm as a verb rather than an ability. The defense against this is to think to yourself: This person is trying to charm me. Why?

### **3. TOO MANY DETAILS**

People who tell the truth don’t feel doubted. They don’t feel the need to add more details that you haven’t asked about. The defense is to remain conscious of the context in which the details are offered. Is this being done to distract you from the obvious?

### **4. TYPECASTING**

A man labels a woman in some critical way, hoping she will feel compelled to prove that his opinion is not accurate. Example: “You are probably too snobbish to talk with me.” The defense is silence. Don’t engage in this type of banter.

### **5. LOAN SHARKING**

The predatory criminal generously offers assistance, but is always calculating the debt. This is counterfeit charity. The defense: Always remember, he approached you – you didn’t ask for the help.

### **6. THE UNSOLICITED PROMISE**

This is the most reliable signal that there is a questionable motive. Always be suspicious of the unsolicited promise. The defense: Ask yourself, why does he need to convince me? Tell yourself: You’re right, I am hesitant about trusting you and, maybe, for good reason.

### **7. DISCOUNTING THE WORD “NO”**

Refusal to hear “no” is a signal that someone is either seeking control or is refusing to relinquish it. If you let someone talk you out of the word “no” that person understands he is in charge. The defense: Ask yourself, why is this person trying to control me?

What does he want? Skip several layers of politeness and repeat, “I said NO!”

With respect to house keys, just as any employee, in any business, who has keys to a desk drawer or file cabinet must return them to the boss when they leave their job, you must ask a PCA to return all keys when they leave. It would be silly to keep them. If you didn’t, many former PCA’s would have access to your belongings unjustly.

If you have had a high turnover rate (had many PCAs recently) and they all had keys to your home, it would be a good idea to have your locks changed about every 3-6 months. PCAs may have had spare keys made which they didn’t return to you. It is an especially good idea to change your locks after you had to fire a PCA. People sometimes take out revenge for the smallest and silliest of reasons.

**Some tips on residence security** offered by the Los Angeles Police Department, Threat Management Unit are, as follows:

- Be alert of any suspicious persons.
- Positively identify callers before opening doors. Use a wide angle viewer on all outside entrances.
- Install a porch light at a height which would discourage removal. Install adequate outside lights.
- Have deadbolt locks on all outside doors.
- Keep garage doors locked at all times and use electric door openers.
- Maintain an unlisted phone number. Notify all household members of any unusual or wrong numbers.
- Any written or phone threats should be treated as serious and notify law enforcement immediately.
- All household employees should have a thorough background check and be informed of your security precautions.
- Use and have all-purpose fire extinguishers in the residence and garage. Install multiple smoke detectors.
- When going out for the evening, use timers on several lights so as to give the appearance of someone being home.

- Intruders like unlocked doors and windows, keep them locked!
- A family dog is the best, and least expensive, alarm system.
- Inform neighbors and relatives of extended vacations or business trips, and ask them to pick up your mail and newspapers.

### **Personal Security**

- Remove home address from personal checks and business cards.
- File for confidential voter status or register to vote using a mail box address.
- Destroy (shred) discarded mail.
- Do not maintain a mailbox with the U.S. Post Office.
- Mailbox address now becomes a person's official address on all records and rolodexes. You may list the number as "Suite 123" or "Unit 123" rather than "Box 123".
- File a change of address card with the Post Office giving the mail box address as your new address.

Most of the safety measures you take are taken from common sense. Simply, use your head and you should be in good shape.

One of the best things you can do is **ESTABLISH A NETWORK** of people to look in on you periodically to check on things, and make sure you are having your needs met. This is not a childish thing, and you are not giving up control of your life by doing it. It is your back-up system for making sure you stay independent. If a problem arises and your assistant isn't due for two hours you could rely on a back-up person to help. Or if a PCA isn't taking care of your needs, abusing you, or simply not showing up, a phone call from a back-up person could be just what you need.

**This back-up network will go a long way to help insure your safety and reassure others who resist your independence. They will know that you can manage your life through others, without their intervention.**

# FINANCIAL RESPONSIBILITY



- **SOCIAL SECURITY DISABILITY**
- **FEDERAL INCOME TAXES**

Payroll issues

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# SOCIAL SECURITY DISABILITY

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This is most commonly known as **SSDI** and that you must be physician certified to qualify.

You can only receive this if you have worked in the past and have accumulated 'credits' for work. The amount you will receive depends on how many credits you have earned. Credits are accumulated quarterly while you work and each credit is worth a certain amount of money.

(As of January 1999 each credit is worth \$740 but it is reviewed and changed every year or so.)

You can also receive an allowance for any dependent children you have.

## Here is how it works in its' simplest terms.

1. You apply for benefits
2. If they ask for certification, you will need a doctors' statement verifying your current *permanent disability*.

### **This process will take from 1 to 4 months**

You should receive your first disability check six months after the date you were determined "eligible"

I repeat, **your checks will start in the sixth full month** from the date *they* decide your disability began (including up to 1 year in back benefits).

So if you apply today.... your checks should start coming to you in the 7<sup>th</sup> month or so.

People who have worked and can draw a pension may start earlier, as soon as they leave work. Pension papers are filed by the employer.

If the company you worked for has a long term disability policy...?? Check with the company benefits administrator if payments to you could start sooner, pending paperwork (e.g. medical information from the doctor).

The other thing you need to know is .....

### **NO Medicare FOR 2 YEARS!**

You become eligible for Medicare coverage in 2 years from the time you start receiving checks. At this time they will ask you if you want Medicare or not. It is your option.

If you choose Medicare coverage they will deduct a payment (or premium) from your check every month AUTOMATICALLY.

## YOU CAN WORK AND STILL RECEIVE SSDI

**TRIAL PERIOD** - As long as you do not earn over \$700 of countable income in any given month you can still receive full benefits. Once you exceed the \$700 amount your benefits will only continue for 10 months.

Also, they don't have to be consecutive months. You can work 3 months and stop. That 3 months will be figured into the trial period for 5 years. After 5 years, if you have not earned over \$700 average you will begin a whole new trial period.

If you **DO** earn over \$700 of countable income per month, on average, your checks should stop between the 10<sup>th</sup> and 12<sup>th</sup> month. If, for any reason you become unemployed again within 3 years (36 mo.) you may receive SSDI immediately without having to reapply.

If you plan to work, be sure you know all the ways you can use Social Security **PASS** (Plan for Self-Support) and **IRWE** to get the most out of your income. I'll explain

**IRWE** – Income Related Work Expenses: This provides a formula by which expenses related to a disability can be deducted “off the top” from wages or salary, so there is less “countable” income. Chargeable “work expenses” include the cost of PCA time needed to get up in the morning and to get to work, as well as, getting back to bed at night and any other work related disability caused expenses. When expenses like PCA costs, non-reimbursable medical care, and disability related products are listed your adjusted income may be lowered dramatically.

Any further information can be obtained through the Toll Free number for The Social Security Administration: **1-800-772-1213**

or on the internet at : <http://www.ssa.gov>



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# FEDERAL INCOME TAXES

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No matter what we do, Uncle Sam must be kept happy when reporting income taxes and employer/employee taxes. The problem is that there are so many different ways of doing it that we often get lost in the myriad of forms to fill out and procedures to follow.

## **Purpose:**

To give you a starting point with which to work with the Internal Revenue Service (IRS).

## **Strategy:**

Because of the ever-changing nature of the federal tax systems' rules and regulations, the following may not be entirely accurate for all tax years, or for all situations. My recommendation is to call your local office for the most up-to-date information. Also you should obtain an accountant (CPA) to help you file your income tax report.

- A. The first thing you need to do is to get a copy of the HOUSEHOLD EMPLOYER'S TAX GUIDE For wages paid in 19\_\_ . (Publication #926, catalog #64286A). It will tell you whether you need to report the wages paid to your PCAs, and whether or not you need to make payroll deductions.
- B. The IRS describes an employer as "a person or organization for whom a worker performs services as an employee. As an employer you may be required to withhold and report employee wages that you pay. To file the various tax returns you need an employer identification number, or EIN."
- C. To get an EIN you must fill out a SS-4 form. You can get this at the IRS office, Social Security office, or call 1-800-829-3676 to order it.

**If you receive funding for your PCA's salary you must ask the funding agency the following :**

- 1) What records they want you to keep.
- 2) What method you will be receiving the funds, and how often.
- 3) What procedure they suggest you use to pay your assistants.

They may ask you to provide Social Security numbers and names of each PCA and pay them directly. I recommend you try to have them agree to pay you so that you can pay your assistants from that fund. The reasons are twofold. One, direct payment takes away some of your right to bargain with your PCA, and two, when you replace a PCA, the payroll processing delay may result in an unearned check that is sent to your former PCA, or a considerable delay for the new hire. On the other hand, if an agency (e.g., AZ Long Term Care) pays your PCAs directly, it is the agency's responsibility to take care of FICA, FUTA, and unemployment.

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## **Call your local Revenue office for more details.**

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### **If you provide non-cash (room & board) wages, you:**

- 1) can deduct salary paid from your own income taxes.
- 2) eliminate the need for withholding other types of taxes like FICA.
- 3) can possibly deduct additional food, electric power, etc. as a medical deduction ( check with your local tax laws before assuming you can do this in your area ) above and beyond what you normally spend for regular household members. For example, you would normally need a one-bedroom apartment but you have to rent a two-bedroom apartment for the PCA. The difference between a one and two-bedroom may be deductible.

To protect your own interests in the case of an IRS audit, make sure that you have documentation to prove the cost of these non-cash items. Your own, personal circumstances will determine how this is done. There is no cut and dry method to use. Each state may have other requirements for reporting state taxes. You will need to check with a tax consultant on how to do it.

The following is a list of forms that may or may not pertain to you. I included it in this manual to give you a brief description of various forms that you will encounter as you prepare to report taxes legally required by the Internal Revenue Service.

**DON'T LET IT DISCOURAGE YOU. ONCE YOU GET INTO IT YOU WILL ESTABLISH  
A SYSTEM THAT WORKS EASILY FOR YOU.**

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# TAX FORM SUMMARY

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| IRS FORM                                      | Used Primarily to Report                                                                                                                                                                                                                                                                                                                    | When Due                                                                                            |
|-----------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------|
| W-4                                           | Employee-desired amount of income tax to be withheld from cash wages (for "household employment" tax may be withheld only if both employer & employee voluntarily agree)                                                                                                                                                                    | At onset of employment & each time employee wants to change withholding status                      |
| SS-4                                          | To obtain employer's Identification number (EIN)                                                                                                                                                                                                                                                                                            | One number for employer's lifetime to use when filing various IRS forms                             |
| 942                                           | a) Cash wages of \$50 or more for each employee in any calendar quarter<br>b) Income tax withheld in the quarter<br>c) FICA (social security) taxes (about 6% of each employee's gross pay) withheld from every employee meeting part a) criteria. Amount to be matched by employer (attach check for combined tax amount to FICA 942 form) | 4 times a year; within 30 days before the end of each IRS-defined calendar quarter (3 month period) |
| 940 & 580<br>Federal<br>Unemploy-<br>ment Tax | FUTA (unemployment) taxes (3.4% of first \$6,000 paid to each employee) to be paid by employer for household employees who were paid cash wages of \$1,000 or more during any calendar quarter.                                                                                                                                             | 1/31 for wages paid in prior year; file 940 with form 580                                           |
| W-2                                           | a) Cash income of employee<br>b) FICA taxes withheld from employee<br>c) Income taxes withheld (see note for W-4 form regarding household employment) Worker is responsible to pay for withholding income taxes.                                                                                                                            | 1/31 for wages paid in prior year, or within 30 days of employee termination.                       |

| IRS Form | Used Primarily to Report                                                  | When Due       |
|----------|---------------------------------------------------------------------------|----------------|
| W-3      | To be filed with Copy A of W-2 and sent to Social Security Administration | 1/31, with W-2 |

#### Non-cash Wages

|      |                                                                                                            |                                                    |
|------|------------------------------------------------------------------------------------------------------------|----------------------------------------------------|
| SS-4 | (See notes on cash wage option)                                                                            |                                                    |
| W-2  | Value of non-cash wages paid; IRS office regarding which form should be used for your particular situation | (see notes on cash wage check with nearest option) |

Instructions for each IRS form are usually included on the form itself.

Any employee you hire must have a social security number. If he/she doesn't, refer him/her to the IRS office to file a SS-5 form with the IRS.

#### **For non-cash wage employers:**

- 1) Be sure to save all bills, rent leases, payment checks, and receipts applicable to items of the non-cash reimbursement. Do not attach them to your tax forms, but save them for at least four (4) years in case of an IRS audit.

- 2) An index card statement, containing information listed below, has been found very helpful to the personal record keeping of such taxpayers. Data should include:

|                                        |                        |
|----------------------------------------|------------------------|
| Name                                   | Date of Birth          |
| Address                                | Social Security number |
| Phone number; pager #; message #; etc. |                        |
| Driver's license number                |                        |
| Hire date                              | Termination Date       |
| Reason for Termination                 |                        |

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# SUMMARY

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The process of hiring PCAs is time consuming as well as frustrating. However, the alternative of living in a nursing home is far more restrictive. The choice is yours. If you spend extra time initially preparing to hire your PCAs, you will spend less time later with PCA difficulties.

There will be problems, no doubt, but the more you do to prepare for and investigate your candidates, the fewer problems you will have managing them or replacing them. Nothing is guaranteed. With every new PCA there will be a learning period and the better prepared you are, the easier the PCA can learn and adapt.

In order to have successful employees, you must be a successful employer. A successful employer will remember the PCA is human and will make mistakes, deserving as much respect as the employer. If you begin the employer/employee relationship with good communication and fairness it will stay that way for a very long time.

Replacing employees occasionally is a necessary part of managing. Don't look at it negatively, look at it as an opportunity to meet new people, to grow and change aspects of your life that could become monotonous or boring. Change can be a very good thing.

It is my hope that you have gained confidence in your endeavor to be independent and will succeed with your new management skills. Just remember that no amount of teaching, or learning will replace the need for good common sense. Select and manage your PCAs with good judgement and respect and you will have success in the future.

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